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ABSTRACT

Prompted by the lack of information about the post-parental, pre-retirement generation, this study identified the nature of stress in the lives of a stratified cluster sample of 113 men and women who were 45 through 64 years of age. In semi-structured, in-depth interviews with experienced M.S.W. social workers, subjects identified the stressful events of the previous year, the major stressor of middle aged, and the cluster of events surrounding the major event. Stressors were classified by source (internal/external), type (loss, threat, chronicity), system most affected (body, personality, family, socio-economic) and focus (self/other). Four age groups were compared on these factors and sex, race and social rank differences were identified. Appraisal of events as major stressors (type) varied significantly by age and social rank and a trend was noted by sex. Major internal events were associated usually with outer related events. Women were more other-focused than men, though other-focused stressors were high in all categories of age and sex. Results may indicate that inability to cope is a factor in aging. (Author)

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THE NATURE OF STRESS IN MIDDLE AGE

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Abstract: Justified by the sparcity of information about the post-parental, pre-retirement generation, this study identified the nature of stress in the lives of a stratified cluster sample of 113 men and women who were 45 through 64 years of age. In semi-structured, in-depth interviews with experienced M.S.W. social workers, subjects identified the stressful events of the previous year, the major stressor of middle age and the cluster of events surrounding the major event. Stressors were classified by source (internal/external), type (loss, threat, chronicity), by system most affected (body, personality, family, socio-economic) and by focus (self/other). Four age groups were compared on these factors and sex, race and social rank differences identified. Appraisal of events as major stressors (type) varied significantly by age and social rank and a trend was noted by sex. External events predominated as both major and related events. Major internal events were associated usually with outer related events. Women were more other-focused than men, though other-focused stressors were high in all categories of age and sex. The hypothesis is suggested that helplessness to cope is a factor in aging.

Certain basic information is needed about the nature of stress in the post-parental pre-retirement phase of life before studies of stressful life events can more fruitfully be adapted to gerontology. Newly emerged in large numbers, this cohort has an ill-defined place in society. It seeks re-definition through modified role patterns which may vary with age, sex, race and social rank (Lowenthal, Thurnher and Chiriboga, 1975). Studies in adult development, which focus on transitional crises such as empty nest and retirement, fail to define between-transition stressors as they vary across the twenty year span of middle age. They fail also to address sufficiently the issue of sex differences in timing of the loss of identifying roles.

Studies of stressful life events using weighted lists of stressors, standardized cross-culturally, have proved useful in relating external

stressors to internal responses (Holmes, 1967). The potential for such studies in gerontology is good. No such lists have been developed which are sensitive to the experiences of this target population, however. Baseline data, rooted in the experience of a community based, age appropriate sample is needed before any reliable measure of middle age stress can be developed (Dohrenwend, 1974: 276-77).

Several questions emerge about the nature of stress in middle age. First, what stress types are encountered by middle agers? Is it possible that older adults face loss and chronic sorrow more than they face anxiety provoking threats? Lowenthal, et. al. (1975), spoke of the decremental nature of changes of mid-life and Cath (1965: 27-34) described the phenomenon of omniconvergence, meaning the bombardment of the personal cosmos with loss experiences in middle age. Object losses, role losses, physiological changes associated with primary aging and ego depletion may be characteristic of this cohort. Coping tasks associated with loss are quite different from those of threat. With irrevokable loss the task is to grieve the loss, accept its finality and restructure one's life without the lost object (Lindeman, 1965: 10-11; Parkes, 1972: 344-48).

With threat of loss or challenge to cherished goals, herein referred to as threat, coping strategies require either (1) direct actions in the form of preparations against harm, attack or avoidance or (2) intrapsychic coping through such methods as attention deployment, defensive reappraisal or wish-fulfillment (Lazarus, Averill and Optom, 1974: 261).

Chronic stressors are those which do not end but require constant long term coping. As the generation most free to inherit society's caretaking duties, the post-parental group may be prone to face such stressors. In addition it is possible that situations which were accepted as challenges

in younger years might be regarded by this cohort as unchangable. Coping with chronic problems requires defenses against recurring negative emotions, maintenance of self-esteem, development of models for a new life style and the development of access to a reference group whose values and goals support the new life style (Adams and Lindemann, 1974: 137).

A second unknown about stress in the lives of middle agers is whether they are self- or other-focused. Lowenthal, et. al. (1975: 171-73) found older women were stressed about events in the lives of other people. "Son's addiction", "husband's promotion", "daughter's pregnancy" may be typical stressors for women in this age. People with other-focused stressors are relative helplessness to effect change in the stress-producing situation.

A third question about the nature of stress in middle age is the locus of stress. In what system or systems of the personal cosmos does stress find expression? It is feasible to hypothesize that the locus of stress changes as people grow older, perhaps shifting from family to the socio-economic system and eventually to the body. Perhaps, too, identity threat peaks at some point and levels off thereafter. Sex, race and class variations may exist which render some groups vulnerable to stress in particular systems.

A fourth question has to do with the source of stress. It seems important to distinguish between inner (psychological and physiological) stressors and outer (environmental) ones as a necessary condition of determining the direction of influence. Future studies of the influence of environmental happenings on physiological and psychological aging will require separate handling of inner and outer stressors. It would be useful as a preliminary step to gather baseline data about the incidence of inner

and outer sources of major stress and of related stress in a community based sample.

This study was planned as an exploratory venture which would provide relevant information for the helping professions about the nature of stress in middle age. Specifically it attempted to provide answers to five questions, namely:

1. Are there age differences in the type of stress experienced by middle aged subjects within a given year and in the system in which it finds expression?
2. Are there sex differences in stress focus among middle aged subjects?
3. Do age, race, sex and social rank differences exist among middle aged subjects in the type of stress they appraise as major?
4. Do age, race, sex and social class differences exist among middle aged subjects in the system in which major stress is located?
5. How do middle agers perceive the source of major and related stressors?

METHOD

Subjects

The target population included men and women 45 through 64, living in East Baton Rouge Parish Louisiana. The age range was expected to include individuals who had completed child-rearing but who had not faced retirement. An attempt was made to recruit proportionate numbers of male, female, black and white subjects from eight geographic regions in the City-Parish, each of which was defined for this study as consisting of census tracts of like median family income. Due to recruitment problems, the sample was not entirely representative of the general population either in sex or race, but numbers were sufficiently large in all categories to permit statistical analysis. The sample consisted of 113 individuals

including 71 women and 42 men; 92 whites and 21 blacks. Twenty-seven subjects were between the ages of 45 and 50, 40 were between 50 and 55, 26 were between 55 and 60 and 20 were 60 to 65. A social rank variable was created using a modification of the Hollingshead and Ridlich formula (1965: 66-75). It reflected the interaction of occupation, education and residence. Forty-three subjects fell within the lowest of the three classes created, 24 in the middle and 46 in the highest.

Design

The design called for semi-structured, in-depth interviews conducted by M.S.W. social workers with subjects in their own homes. Subjects were told that stressful life events were defined as those happenings in life, pleasant or unpleasant, which required some unusual coping effort on their part. They were asked to give information about: (1) those stress events encountered in the twelve month period immediately preceding the beginning of the interview period; (2) the stress event considered by the subject to have been the major such event since his or her forty-fifth birthdate; and (3) the events which the subject recalled as having occurred in close proximity to the major event. Answers to these questions produced three sets of data labeled for convenience as "recent stress", "major stress" and "related stress". Recent stress was classified by type (loss, threat, chronicity) and by system affected (body, family, socioeconomic, personality). Major stress was classified by type, focus (self/other/mixed), source (internal/external) and system affected (body/personality/family/socio-economic). Related stress was classified by source only.

Recent stress variables were used descriptively. Percentage distributions were used to reflect the stress type experienced by the four age groups during the preceding year and the system(s) affected by it. Major

stress, consisting of a single stressor for each subject, was singled out for more detailed analysis. Major stress type, focus and system affected were related to age and the other demographic variables using chi square. Finally, the source of major stress was compared to the source of related stress by frequency distribution.

FINDINGS

Recent Stress

The 113 subjects reported 246 stressful life events in the specified twelve month period. These included three events by 45 year old subjects which had occurred prior to the 45th birthdate. Table 1 is a percentage distribution showing age by system affected.

TABLE 1
PERCENTAGE OF RECENT STRESSORS
AGE BY SYSTEM AFFECTED

System	Age 45-49	50-54	55-59	60-64
Body	20	22	11	25
Family	42	35	45	38
Socioeconomic	22	22	24	21
Personality	16	21	20	16
TOTAL	100	100	100	100

N = 243. Three events reported by two 45 year subjects as having occurred before the 45th birthdate are excluded.

The youngest subjects reported higher rates of stress in the family than any other system. Forty-two percent of their recent stress events were family related. They reported relatively few personality stressors (16 percent), possibly indicating that identity threat related to the loss of identifying roles had not yet affected them. Bodily and socioeconomic

stressors were in moderation representing 20 and 22 percent of their recent stress events.

The 50-55 cohort reported fewer family stressors (35 percent) and more personality ones (21 percent). This may be reflective of the identity changes associated with child launching. Bodily and socioeconomic stressors remained moderate with 22 percent each.

Family stress was higher in the 55-59 cohort than in any other age group. It represented 45 percent of the stress in that age category. This possibly reflected the high incidence of object loss associated with family deaths. Socioeconomic stressors also peaked in this age at 24 percent while bodily stressors declined to a mere 11 percent. Personality stress was steady at 20 percent.

As might be expected, there was a sharp rise in bodily stressors in the 60-65 age group where they peaked at the 25 percent level. All other stressors leveled off: family, 38 percent; socioeconomic, 21 percent and personality, 16 percent.

Table 2 shows a percentage distribution of recent stress indicating age by stress type. All age groups reported threat as the predominant

TABLE 2

PERCENTAGE OF RECENT STRESS

AGE BY STRESS TYPE

Type	Age			
	45-49	50-54	55-59	60-64
Loss	22	25	33	32
Threat	56	57	40	53
Chronicity	22	18	27	15
TOTAL	100	100	100	100

N = 243. Three events reported by 45 year old subjects as having occurred before the 45th birthdate have been excluded.

stress type. It was less pronounced among subjects in the 55-60 age group when both loss and chronicity were relatively high. This again suggests that the late fifties are years when people lose significant others and resign themselves to chronic situations. A higher incidence of threat among the 60-65 year olds may reflect anxiety about approaching retirement.

Stress Appraisal

Major stress data were then analyzed. Age, sex, race and social rank were related to major stress system using chi square. No significant findings resulted. Major stress type, however, was found to be significantly related to age ($x^2 = 12.77$, 6df, $P < .05$), social rank ($x^2 = 10.24$, 4df, $P < .05$) and a trend was noted in its relationship to sex ($P < .10$).

Appraisal of loss was found to be a function of age representing a low of 22 percent of the appraisals among the youngest subjects and a high of 55 percent among the oldest. In each of the two older groups, loss was the predominant type of major stress while threat predominated among subjects in the two younger groups. Twenty-five percent of the oldest subjects appraised chronic stress as major reflecting their somewhat

TABLE 3

PERCENTAGE OF MAJOR STRESS

AGE BY STRESS TYPE

Major Stress Type	Age				Total
	45-49	50-54	55-59	60-64	N
	%	%	%	%	
Loss	22	31	54	55	43
Threat	56	56	35	20	50
Chronicity	22	13	11	25	19
TOTAL	100	100	100	100	112*
	(N = 27)	(N = 39)	(N = 26)	(N = 20)	

* One missing value. Chi square = 12.77; 6df, $P < .05$.

discouraging approach to old age. Surprisingly, however, it was the youngest group, not either of the two middle ones, which was second highest in this appraisal. The incidence of threat as a major stress type declined from a high of 56 percent in each of the two younger groups to a low of 20 percent. It is interesting to note that recent stress and major stress differ as can be seen by comparing tables 2 and 3.

Stress type was found to be a function of social position ($x^2 = 10.24$, 4df, $P < .05$). Over half of the appraisals of threat as a major stress type were made by subjects in the highest of three categories of social rank, while both loss and chronicity were highest in the lowest rank. Table 4 reflects these findings.

TABLE 4

PERCENTAGE DISTRIBUTION

SOCIAL RANK BY MAJOR STRESS TYPE

Major Stress Type	Social Rank Low %	Medium %	High %
Loss	51	42	24
Threat	28	50	58
Chronicity	21	08	18
TOTAL	100	100	100
	(N = 43)	(N = 24)	(N = 45)

N = 112. One missing value. Chi square = 10.24, 4df, $P < .05$.

A trend ($P < .10$) indicated that women reported somewhat more loss (42 percent) and chronic stress (21 percent) as major stress types than their male cohorts who reported 32 percent loss and 10 percent chronic stress. Table 5 shows these findings.

TABLE 5

SEX BY MAJOR STRESS TYPE

NUMBER AND PERCENT

Major Stress Type	Sex					
	Females		Males		Totals	
	N	%	N	%	N	%
Loss	30	42	13	32	43	38
Threat	26	37	24	59	50	45
Chronicity	15	21	4	10	19	17
TOTAL	71	100	41	100	112*	100

* One missing value. Chi square = 5.53, 2df, $P < .10$.

Stress Focus

A significant difference was found between the sexes in their stress focus ($x^2 = 11.46$, 2df, $P < .01$). Thirty-nine of the 112 major stressors reported were judged to be self-focused, 58 were other-focused and 15 were mixed. Other-focused stressors clearly reflected the subject's reaction to events in the lives of other people and self-focused ones, to events in their own lives. Mixed responses were those which might have fit in either category. Illness of another person, for example, would be other-focused unless there was evidence to suggest the subject's reaction to the physical care of the ill patient was itself a major component of the stress.

Thirty-eight of the 58 other-centered events were reported by females. This represented 66 percent of the female stressors. Twenty of these reflected concern about their children and grandchildren and included such events in the children's lives as suicide gesture, mental breakdown, divorce, running away from home, failing in school, etc. Seventeen of the female other-focused stressors involved death of significant others including 6 husbands, 3 mothers, 3 fathers, 3 brothers, 2 children and an aunt.

Forty-six percent of the male responses were other-focused. The men were almost as concerned as the women about events in the lives of grown children. Many of their concerns were about grown sons. They, too, were concerned about the death of significant others (19 percent) but no man in the sample had lost a wife through death.

Table 6 reports the significant difference between the sexes in regard to stress focus.

TABLE 6

PERCENTAGE DISTRIBUTION: MAJOR STRESS

SEX BY STRESS FOCUS

Stress Focus	Sex: Females %	Sex: Males %	Totals N	Totals %
Other Focus	55	46	58	52
Self Focus	28	46	39	35
Mixed	17	8	15	13
TOTAL	100	100	112*	100

* One missing value. $x^2 = 11.46$, 2df, $P < .01$.

Perceived Source of Stress

Of the 112 major stressors reported by 113 subjects, 100 or 89 percent were outer events and 12 were inner ones. Related stressors were also from outer sources. One hundred thirty-two of the 157 outer events reported (84 percent) were from environmental sources. Inner source to related events almost always was identified with outer major stressors. Only 3 of 25 inner source-related stressors were identified with inner source major stressors. See Table 7.

TABLE 7

FREQUENCY DISTRIBUTION: RELATED STRESS SOURCE

SOURCE OF MAJOR STRESS BY SOURCE OF RELATED STRESS

Related Stress Source	Major Stress Source Outer	Inner	Total
Outer	113	19	132
Inner	22	3	25
TOTAL	135	22	157

DISCUSSION

The only significant findings in this study were those pertaining to major stress type and major stress focus. Age, social rank and sex (trend only) differences were found in the type of stress appraised as major. Threat, the stress type reflecting anxiety about impinging danger and challenging situations, seemed a dubious privilege of those considered to having coping advantages: the young, the more affluent and the men while loss and chronic stress were the curses of older people, lower classes and of women. These findings, together with that of the significantly higher proportion of other-focused major stressors among women, point to the possibility that relative helplessness to effect change in circumstances might influence the appraisal of stress type. The fact that the youngest group and lowest class are second highest in chronic stress is a more curious finding.

These findings have some implication for gerontological studies. Since loss is associated with disengagement (Parker and Brown, 1972: 449) and prolonged stress with depletion (Cath, 1964: 40-42) and exhaustion (Selye, 1964: 87-89), the question arises as to whether there is a relationship between helplessness to cope and the aging process.

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